DOCUMENT RESUME

ED 156 633 95 SP 012 717

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TITLE Career Development Opportunities for Educational Linking Agents. A Guide to Preliminary Planning and Locating Resources.
INSTITUTION Far West Lab. for Educational Research and Development, San Francisco, Calif.
SPONS AGENCY National Inst. of Education (DHEW), Washington, D.C. Dissemination and Resources Group.
PUB DATE Dec 77
CONTRACT 400-76-0050
NOTE 69p.
AVAILABLE FROM Linking Agent Support, Far West Laboratory for Educational Research and Development, 1855 Folsom St., San Francisco, CA 94103 ($2.00)

EDRS PRICE MF-$0.83 HC-$3.50 Plus Postage.
DESCRIPTORS *Change Agents; Decision Making; Educational Objectives; *Guidelines; *Management Development; Material Development; Needs Assessment; Personnel Selection; *Program Development; Resources; *Training Techniques
IDENTIFIERS *Linking Agents; *Training Programs

ABSTRACT

Suggestions are made for helping project managers aid educational linking agents in acquiring new skills or sharpening existing skills. These tentative suggestions are grouped into five categories: (1) skill/knowledge domains; (2) setting priorities; (3) choosing among options; (4) selecting trainers; (5) resources. Skill/knowledge priorities identified are problem analysis, information collection and organization, analysis of information, planning, producing, evaluation, dissemination and marketing, communication and implementation. Instrumentation for identifying these needs is provided. All of these needs are not regarded as germane to every linking agent situation. Therefore, priority setting in the development of agent training programs is viewed as necessary on the part of project managers and should involve determination of needed skills, proficiency levels, number of agents needing training, functional job analysis, determination of physical demands, and needed linking agent characteristics. A checklist for the training decision process illustrates priority setting methods. Managers' choice of training options is depicted as involving determination of client and manager desires for linker skills, balancing linker professional growth with organizational needs, and choice among learning experiences. A detailed list of advantages and disadvantages of various instructional methods is provided. A checklist of points to consider in selecting trainers and materials is provided to focus on type of training, need for external trainers, training scope, and other programmatic decisions. Examples of possible staff development resources are provided to illustrate the array of organizations, training/knowledge products, catalogs, newsletters, and funding sources available. (MJB)

ED156633

# Career Development Opportunities For Educational Linking Agents

U.S. DEPARTMENT OF HEALTH, EDUCATION & WELFARE
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A GUIDE TO
PRELIMINARY PLANNING
AND LOCATING RESOURCES
(Experimental Edition, 1977)

The National Institute of Education
U.S. Department of Health, Education and Welfare
Washington, D.C. 20208

SP012 117

# CAREER DEVELOPMENT OPPORTUNITIES FOR EDUCATIONAL LINKING AGENTS

## A Guide to Preliminary Planning and Locating Resources

Fred S. Rosenau

Prepared for the

National Institute of Education

by the

Far West Laboratory for Educational
Research and Development

San Francisco

SP012 717

Experimental Edition

December 1977

This project has been funded by the National Institute of Education, Department of Health, Education, and Welfare, under Contract # 400-76-0050. The contents of this publication do not necessarily reflect the views or policies of the Department of Health, Education, and Welfare and the National Institute of Education, nor does mention of trade names, commercial products, or organizations imply endorsement by the U. S. Government or the Far West Laboratory.

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## ACKNOWLEDGMENTS

Funding support for the development of this experimental guide and for the fieldwork that made it possible was provided to the Laboratory by the Dissemination and Resources Group of the National Institute of Education (NIE). However, the NIE is not responsible for the opinions expressed in these pages, and no official endorsement should be inferred.

Among those who contributed ideas, suggestions, and criticisms for this work are Paul Hood, Spencer Ward, Diane McIntyre, Stanley Chow, Judy Brown, Margaret Robinson, Donna Bellorado, Donna Lloyd-Kolkin, Bob Craig, Bill Hull, Jim Davis, Dorothy Blackmore, Sue Klein, Dave Crandall, Jennifer Futernick, Lynn Jenks, Virginia Thompson, Carolyn Cates, and Diane Lassman.

We have also benefited from materials loaned to us by Carl Gasaway, Dick Brickley, Virginia Cutter, and Ron Capasso.

We have relied heavily at various times on portions of three publications: Training and Development Handbook (ed. by Craig, 1977), Linking Processes in Educational Improvement (ed. by Nash & Culbertson, 1977), and Assessment of Training Needs (Leonard, 1974).

Above all, we are indebted to those linking agents who answered our questions, filled out forms, and allowed us to observe them working with their clients.

Finally, production of this handbook would have been impossible were it not for the invaluable help of Ursula Hoffman.

Fred S. Rosenau

# I. INTRODUCTION

This experimental handbook has emerged from a two-year cooperative effort* among various nonprofit educational agencies as they have tried to begin development work on a nationwide support system to help educational linking agents meet the varied challenges faced in their daily activities.

We are viewing the role of linking agent, in this instance, as a field person employed in a regional, state, or intermediate agency who crosses organizational boundaries in an effort to help with school improvement. For example:

- a dissemination specialist in a state education agency who works with a number of local school districts;
- a field specialist in a resource agency who delivers information packets to educators in a given service area;
- an external relations staff member in a regional educational laboratory who describes its mission to various audiences;
- a curriculum specialist operating out of a county education office who helps teachers find new classroom alternatives;
- a resource specialist in a state facilitator project who works intensively with groups of educators;

and so on.

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* See, for example, Educational Dissemination and Linking Agent Sourcebook (1977).

In spite of the fact that almost no preservice training* exists as yet to prepare people specifically for work as educational linking agents, it appears that the various nationwide and regional dissemination systems are contributing significantly to school improvement. We attribute this success to the dedication to education and the willingness to learn on the job of those who have selected themselves into this new dissemination domain. But with the demands for skilled linkers increasing each year, the need for staff development opportunities becomes increasingly critical. A handful of self-taught, highly motivated linkers will no longer suffice to staff the growing number of dissemination projects across the nation. So we visualize this handbook as a tentative set of guidelines for those now ready to help linkers acquire new skills or to sharpen existing skills.

Many individuals now in these linker roles are expressing a need for training, consultation, and other support. In addition, as the demand for accountability in education increases and the demand for personnel in linker roles grows, there will be a greater need for training and support systems for linking agents. This guide provides a tentative set of planning guidelines for such training and other managerial support efforts.

The challenge of finding suitable opportunities to meet the support needs of linking agents is far from easy. Many options seem expensive, many are geographically distant from the linker's workplace, and many are unproven as to quality. Moreover, career progression cannot yet be hastened or enriched

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* An exception may be some aspects of Indiana University's Graduate Program in Instructional Systems Technology, which offers such courses as "Introduction to Diffusion and Adoption of Educational Innovations," "Diffusion and Adoption of Educational Innovations--Models, Techniques, and Applications," and "Theory and Principle of Message Design." See H.S. Bhola et al., "Training the Change Makers in Education," Audiovisual Instruction (January 1973).

nor can tenure be assured in any tangible fashion from enrollment in currently available workshops. Over time these disincentives may be reversed, but for now it appears that the aspiring linking agent must seek his or her own career development opportunities simply in hopes of achieving greater effectiveness, advancement, and satisfaction, or broader professional visibility.

This planning guide is intended principally for those who manage dissemination projects that employ linking agents. We realize that much of the information will also be useful to linkers who work within local school districts and to linking agents in other types of organizations. But the focus throughout is on the planning of staff development as viewed from the manager's perspective.

Furthermore, it is important to state clearly that this particular guide is not prescriptive. The current state of the art is such that we are not prepared to state definitively what the manager should do first, what next, and so on. All we can offer at this moment is a compilation of suggestions based on evidence from other training domains.

In these pages we will outline some guidelines that suggest sequences and procedures for staff development. We will list some linking agent resources to make the locating of options somewhat easier. But we will not try to answer such first-order questions as:

- What are managers of linkers doing now?
- Why are linkers performing as they are?
- Who will enter staff development programs?
- Precisely what procedures/materials/people will help with training?
- What behavioral objectives should be set?
- What learning modality is most suitable?
- How long should training last?

- What kind of training is most effective?
- How should training be evaluated?

Yet all these questions will need to be answered by the manager of linking agents at the time a staff development program is organized and launched.

This experimental document is offered now as one means of gathering information from educational dissemination groups that are beginning their own staff development efforts. We invite comments from linkers everywhere--ideas for improvements, identification of additional human and material resources, suggestions for possible revisions or updating, or simply notions on future opportunities that might enhance nationwide dissemination systems in the 1980s.

## II. SKILL/KNOWLEDGE DOMAINS

The skills and knowledge a linking agent needs to perform successfully in a dissemination role must be defined in relation to the functions and responsibilities of his/her specific work assignment. However, when we first began to probe informally the perceived needs of linkers in the field, we received reports that cited "human relations" or "interpersonal skills" or "public relations" or "negotiation" or "how to find information" or "conflict management" or "communication." Almost no concrete training needs were mentioned.

Our next step was to reread many of the evaluation studies and case studies of projects that employed educational linking agents. We copied verbatim the phrases that seemed to document what a given linker actually did while working with client groups in the field. Then we grouped these activities so as to eliminate outright duplication and presented them to a group of our colleagues, knowledgeable about dissemination. Each marked the items that seemed of highest priority or concern. Items surviving this screening process were assorted into nine categories* as shown below:

Problem Analysis

Information Collection and Organization

Analysis of Information

Planning

Producing

Evaluation

---

* Based on a taxonomy suggested by various authors in Linking Processes in Educational Improvement (1977).

Dissemination and Marketing

Communication

Implementation.

In this fashion we arrived tentatively at two parallel sets of skill clusters arranged according to an experimental classification effort (see Appendix A). Another classification system, developed by Gasaway and Erwin for the Illinois Office of Education, and other useful assessment instruments will be reproduced in another publication.*

Users of this handbook are encouraged to adapt/adopt portions of any of these to arrive at a set of skill clusters pertinent to the needs of linking agents who are trying to decide on their own staff development priorities. They are included in this guide as suggestions to help managers both to visualize overall linker functions and to begin to plan staff development priorities (see Section III).

Any categorization of necessary linking skills will depend on the orientation of the dissemination project, its focus, and the types of personnel to be recruited. If staff members are chosen to carry out organizational development (OD) work with client groups, they should have or acquire OD process skills used in work with a small number of clients. If project staff are following a marketing model and expect to provide, for example, copyright or packaging or direct mail consultation for many diverse client groups, then an entirely different recruitment and training process must be emphasized. If the field work is to be focused on research, development, dissemination, and implementation (RDD&I) or knowledge production and utilization (KPU) efforts, project staff with strong R&D backgrounds will be needed. And if the field work will be heavily concerned with information science, staff must be sought or trained so

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* P. D. Hood, F. S. Rosenau, "Assessment Instruments for Educational Linking Agent Training: A Preliminary Compendium." (Far West Laboratory, 1977.)

that each linker is skilled in needs negotiation, search, retrieval, transformation, and communication of information.

An organizational development (OD) perspective, for example, might view the linker's role as involving team building, job enrichment, and internal consulting with a very few school district groups. Skill categories would then entail entry, data collection, diagnosis, intervention, evaluation, and withdrawal. Another way of outlining OD skill clusters would be: clarifying communication, establishing goals, uncovering and working with conflicts, improving meetings, solving problems, making decisions, designing training interventions, and evaluating.*

Many of the abovementioned skills are not precisely covered by the tentative problem-solving classification system we chose to experiment with. Nor have we dealt here with the political "sensing" skills that linkers would need as new educational legislation or regulations emerge in the region(s) they service. Linkers working in areas that require formal statewide textbook adoption procedures or those that have varied sources of funding for educational alternatives will need to possess or quickly acquire keen sophistication in a variety of political and fiscal processes.

Moreover, if the linkers' responsibilities require the promotion of materials that must be purchased by client groups as an integral part of the social change process, then an array of social (or nonprofit) marketing skills will be needed.

Ideally, dissemination project managers would review in advance the whole range of skills that they believe their field staff might need to perform

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* See, for example, R.A. Schmuck & P.J. Runkel, Handbook of Organizational Development in Schools, Palo Alto. Calif.: National Press Books, 1972.

successfully as linking agents. Then, as part of the recruitment process, managers would search for staff already able to demonstrate many of those skills and/or eager to acquire them. By so doing, project management can reduce its investment of time and resources for staff development activities.

The experience of the National Diffusion Network and other major educational dissemination efforts in the early 1970s suggests that personal attributes (presumably beyond the staff training domain) are of critical importance in this type of field work. Tolerance for ambiguity, ability to deal with frustrations, enthusiasm, independence, integrity, tolerance for varied viewpoints, flexibility, supportiveness--these are but a few of the pre-existing attributes evidently essential for success in linking agent activities.

If, however, staff are selected on the basis of mere availability and without careful assessment of the fit between previous experience and the specific field assignment, the need for a structured and continuing staff development effort will be vastly increased. And given the current dearth of preservice programs that might produce a larger pool of trained and talented linking agents, each dissemination project can anticipate that its linkers will want to acquire new skills or to strengthen those most heavily emphasized in light of that project's special focus and functions.

## III. SETTING PRIORITIES

Our first examination of educational linking agent training priorities suggests that problem analysis, planning, implementing, and evaluation represent skill clusters for which learning experiences would be beneficial at the present time. Yet in any specific dissemination project, only one or two of these areas may be pertinent. Each project's staff members will want to develop their own list of staff development needs.

Given limited time and resources for staff development, it is clearly vital that each project determine for itself where to begin. Interests of field staff should be considered, for if they are not motivated to enhance their knowledge and skills, no management-organized training program is likely to succeed. Thus, management and linkers should jointly and interactively plan staff development efforts.

No staff development effort can succeed without adequate time and resources. A realistic estimate of what may be feasible within budgetary and time constraints is an essential first step. Once resources have been allocated, linkers will be better able to decide how realistic their training aspirations may be.

Another variable is the desired level of skill to be attained. Degree of achievement in training can be depicted as shown in Table I on the following page.

The number of linking agents who want to acquire or refurbish a specific set of skills will also affect planning for training. If only two linkers are involved, it will probably be cost-effective to send them to a workshop

TABLE I

LEVEL OF PROFICIENCY

1. I have no specific knowledge about this activity nor experience with it.

2. I have read about or seen this activity performed, but have no experience with it and don't really understand it.

3. I have studied this activity or have frequently seen it performed and have a good understanding of it, but I have not yet done it.

4. I have a general understanding of this activity and have had some experience with it, enough so that I can do it if I have either detailed instructions or close supervision.

5. I have enough experience in performing this activity to do it if given enough general supervision or general instructions.

6. I have enough knowledge and experience with this activity so that I can perform this task quite satisfactorily without supervision or job aids.

7. I have had extensive experience with this activity and can perform it quickly, efficiently, and do a top quality job.

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Reprinted from "An Assessment System of Competence-Based Education," Paul D. Hood and Laird Blackwell (ERIC ED 126 142).

elsewhere. But if ten linkers locally need to learn one set of skills, the trainer or facilitator can be brought to the local site to conduct the training. Or a dissemination project might cooperate with others in its state or region to share in planning and paying for a practicum that would meet a certain high-priority need.

Table II provides a highly detailed checklist that may be useful to those planning for a full-scale staff development effort. But this checklist alone will not suffice for planning. Each dissemination project still must decide how to discover the real needs of its own staff and how to match those needs with realistic staff development opportunities. (See appendix.)

Any analysis of staff development should ideally be preceded by a functional job analysis of the linking agent's assignment. For each function, a rating scale may be applied, such as the following:

0 - not required

1 - medium to low requirement in some part of the job

2 - above average requirement on numerous occasions for the job

3 - very high requirement in some element of the job.

The analysis should include a careful survey of all job elements--what is done, how, and why. Then performance requirements should be established:

- Responsibility--e.g., for cooperation with others.
- Job knowledge of processes, equipment, techniques, procedures.
- Mental application--ability to use initiative, alertness, make independent judgments, accuracy, etc.

The physical demands of the work must also be considered--driving ability, typing, ability to operate and/or maintain audiovisual equipment, out-of-state travel requirements, etc. And desirable linking agent characteristics might also be spelled out--ability to plan, oral and written expression, tact,

emotional stability, meeting and dealing with educators, adaptability, memory for names of people, and so on.

If possible, project managers should estimate for the linkage role the proportion of effort that should be allocated among the various functions, such as consulting, instructing, persuading, exchanging information, helping/solving, record-keeping, operating audiovisual equipment, making presentations, etc. Then, after setting forth proposed criteria for assessment of linker performance, dissemination managers and linkers can together establish training, education, and on-the-job coaching priorities for the year ahead.

TABLE II

CHECKLIST FOR THE TRAINING DECISION PROCESS*

| Step 1: Who, if anyone, needs training? |
|---|

1.1 Have we *ascertained* the real problem that improved training is expected to alleviate?

1.2 Who needs *extensive* training to learn an unfamiliar job?

1.3 Who might improve *his/her* performance by additional or refresher training?

1.4 Who might become more promotable through training?

1.5 Have we determined that training is needed?

| Step 2: What training do they need? |
|---|

2.1 Have we established the best way of doing the job or *the function*?

2.2 What background is needed in learning the job or *function*?

2.3 Have we prepared a task analysis?

2.4 Have we *identified* the types of learned performance involved *that* indicate *a* need for special instructional methods?

2.5 What standards of performance are expected from an experienced worker on the job?

2.6 How will performance standards be measured?

2.7 Have the results of the analysis to identify who needs training and the type of training been verified by the trainee's immediate supervisor?

(continued)

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* Adapted from Leonard (1974). Copyright 1974 by the City of Fort Wayne, Indiana, for the Midwest Intergovernmental Training Committee.

Italics indicate changes from original.

Table II, page 2

| Step 3: | What are the purposes of that training? |
|---|---|

3.1 Will training be given specifically to meet the *identified* needs of individual trainess?

3.2 Is training the best solution to the problem?

| Step 4: | What are the instructional objectives that need to be incorporated into the training program? |
|---|---|

4.1 Have we specified the ... context in which training is needed?

4.2 Have we decided the best way to handle each aspect of the training?

4.3 What standards of performance do we expect the trainees to have before and after the formal training *experience*?

4.4 How will these standards be measured?

4.5 In selecting instructional methods, did we consider the importance, learning difficulty, and types of learned performance involved in each aspect of the training?

4.6 *Do* we *know how to design an instructional system*?

| Step 5: | Is there commitment throughout the organization for the purposes of training? |
|---|---|

5.1 Have the trainees been screened to establish their individual training needs?

5.2 Do the supervisors of the trainees fully support our proposed training plan?

| Step 6: | What training and development programs best meet the specified instructional objectives? |
|---|---|

6.1 Is the program needed?

6.2 Who should offer the program?

(continued)

Table II, page 3

6.3 Who will present the program?

6.4 What is the program content?

6.5 What is the time and place of the program?

6.6 Is there an adequate ... plan to guide the presentation of each session?

6.7 How will the progress of the trainees be *monitored* during the *learning experience*?

6.8 Does the timetable offer sufficient variety to maintain the trainees' interest?

6.9 What instructional aids and equipment will be needed to prepare for the *training*?

| Step 7: What are the anticipated benefits to be derived from the training? |
|---|

7.1 How will they be measured?

7.2 Are the benefits aligned with perceived deficiencies?

| Step 8: What are the costs of the program? |
|---|

8.1 What is the direct cost of instruction?

8.2 Have we included travel, per diem, *and* salary and fringe benefits of the trainees in our cost estimate?

8.3 What are the costs of facilities, special equipment, etc.?

8.4 What were the costs of preliminary analysis, needs identification, etc.?

8.5 Who will pay the costs of the training?

8.6 If *resources* aren't available internally, are there outside sources of funding?

(continued)

Table II, page 4

| Step 9: | What is the decision of least decision? |
|---|---|

9.1 Have we *identified* the training program that deserves top priority?

9.2 *Does management fully* support ... the list of training priorities?

9.3 Apart from training, what else is needed to alleviate the problem?

| Step 10: | Implementation, evaluation, and utilization of feedback. |
|---|---|

10.1 Was the *learning* presentation adjusted to meet the needs and difficulties of the trainees?

10.2 *Has progress of* trainees been *regularly* checked and ... feedback given ... ?

10.3 Was assistance given to trainees *who* needed additional *help*?

10.4 Were the trainees' performance standards checked at the end of the *learning experience*?

10.5 Were the trainees allowed to apply their learning *during or* immediately after the *training*?

10.6 Were the trainees briefed on the standards of performance expected of them as experienced workers?

10.7 Were the trainees given the additional training and *help* they needed to bring them up to the standard in the minimum time?

10.8 Were the trainees' performance standards checked as soon as they were thought to have reached the standard expected of an experienced worker?

10.9 Did the results of the *assessment* at the end of the *training* indicate that what was taught had helped them quickly to reach the standards expected of an experienced worker?

10.11 Have the results obtained helped to alleviate the original problem?

10.12 Could the same (or better) results of the training be obtained in the future at a lower cost?

10.13 What improvements in the training will be made for the future?

## IV. CHOOSING AMONG OPTIONS

Managers of dissemination projects should consciously try to make the learning and growth opportunities as exciting as possible--if only to crowd out any lingering negative attitudes that may remain from earlier administrator or teacher inservice experiments. Time priorities must be established. Threat of failure must be removed. Each individual linker must be motivated to aspire to some type of growth--as contrasted to any taint of "rehabilitation." An eclectic approach should be considered--with choices being offered as an incentive to participate willingly; variety by itself can be a stimulus. Principles of adult learning* must be kept in mind in this attempt to meet each person's needs and interests while still fulfilling the focused overall goals of the dissemination project.

A major point to consider will be whether the linkers' clients and the linkers' managers want to see the same core skills developed in and exhibited by the linking agents. Each may have somewhat different perceptions of what linkers do well that makes them effective in their daily activities. Obviously training will differ depending on whose perception of the linkers' role carries the most weight. Is the accomplished linker to be viewed ultimately as an educator, a nonprofit marketer, a counselor, a problem-solver, a friendly contact person, an information provider, or perhaps some or all of those.

Another consideration is determining the balance between individual professional growth and strengthening the organizational entity. Here the planner

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* See, for example, M.S. Knowles, The Adult Learner (Houston: Gulf Publishing, 1973) and J.D. Ingalls, A Trainer's Guide to Andragogy, Rev. Ed. (Washington, DC: Superintendent of Documents, 1972).

of training may need to assess priorities on the basis of how to meet first those staff needs/interests that are most likely to improve organizational efficiency and effectiveness and to deliver better service quickly to key groups of clients. Since successful field work in dissemination projects tends to be a group effort, training on a team basis should offer promise of advancing the "state of the art."

In order to select options within a full-scale integrated effort, some agreement on needs assessment, goals, objectives, financial support, degree of commitment, mode of coordination, priorities, and ongoing evaluation will clearly be required. Then choice among optional programs can commence.

From the managerial viewpoint, the staff development effort--even if it aims at incremental change--must be related to the mission of the organization. Learning experiences should ideally help each linker to move ahead in both the skill and knowledge domains and to improve both attitudes and behaviors. All learning should include opportunities to practice in a safe environment, with an understanding that failures during training are acceptable prior to actual use of the new skill in the field. All learning should be accompanied by prompt and pertinent feedback. All learning should begin with problems linkers face at present (e.g., how to deal with an irate client) or are likely to face momentarily (e.g., an unreasonable request for service). Learning should be intensive rather than sporadic. And learning should fit neatly into each linker's individual goals for the future. Above all, the real aim is to improve performance, not to master some type of "training."

Dissemination managers can provide access to, and resources for, a sizable number of learning experiences, such as:

- Postsecondary offerings--at colleges, community colleges, correspondence schools, proprietary schools, university extension divisions, etc. Course offerings in sales, information science, time management, communication skills, group-process skills, etc. are offered in most urban areas.
- Workshops/seminars--American Management Association, American Society for Training and Development, National Academy of School Executives, and other nonprofit organizations publish schedules of regional workshops or seminars from one day to a week in length.
- Self-contained products--several published reference tools enumerate a range of possible "training" products (e.g., Educational Dissemination and Linking Agent Sourcebook, Guide to Simulation/Games for Education and Training).
- Consultants--many experienced trainers (both profit-making and nonprofit) offer their services locally or nationally.
- Observation--an inexperienced linker can spend time traveling with and asking questions of an experienced linking agent.
- Site visits--an inexperienced linker can visit another dissemination project and study how it functions vis-à-vis its clientele.
- Professional reading--knowledge of the theoretical underpinnings of dissemination work can be gleaned from literature reviews, journal articles, case studies, evaluation reports, and other documents.
- Implementation products--a neophyte linking agent can unearth a large body of practical material by studying and asking questions about some of the recent products developed by experienced dissemination professionals (e.g., Forms and Formalities [revised edition,

in press], Packaging Your Educational Program, The Educational Information Market Study, Tactics for the Educational Change Agent [ED 096 258], Guide to Adoption and Implementation Decisons [a publication of the Far West model of Experience-Based Career Education, 1977]).

- On-the-job training--a planned, continuing program to acquire and upgrade the generic skills needed for success as a linker employed in a dissemination project with a specific philosophy and focus.
- Local small-group staff development--an integrated, role-specific set of learning experiences to build a permanent dissemination team that will operate over time within an agency that provides tenure for its staff.
- Informal interactions with a number of other linking agents.

The advantages and disadvantages of a few of these options are depicted in the following table. Managers setting up training programs might sketch out the pros and cons of all the options they have decided upon before they launch their own staff development programs. The next section discusses some criteria that may be used when considering which options may be most cost-effective for any given group as it looks toward a staff development experiment.

TABLE III

ADVANTAGES AND DISADVANTAGES OF VARIOUS INSTRUCTIONAL METHODS

| Method | Advantages | Disadvantages |
|---|---|---|
| On-the-Job (instruction by supervisors) | Realistic; has built-in motivation and application. | Press of work prevents training; qualified instructors not available; training limited to immediate needs. |
| After-Hours (university courses) | No interruption to work; trainee able to relate instruction to *his/her* work each day. | Courses not available locally; trainees not able to participate; or too fatigued. |
| Workshops, seminars, & institutes | Combines lecture and application; promotes interchange among participants who help teach each other. | Removes people from job; costs of facilities and instructors; too short; not support actual requirements. |
| Classroom courses during working hours | Full-time focus on what is to be learned; central use of instructors and facilities; degrees and certificates for motivation. | Requires separation from work; cost of instructors, facilities, travel are high. |
| Correspondence Courses | Professionally guided self-study at own pace; very low cost per student (after initial outlay). | Some individuals not able to learn, apply, or retain instructions; others unable to study on their own. |
| Programmed and computer-assisted instruction | Efficient, organized, individualized instruction at low cost per student (after initial cost). | Management development courses not yet available; high cost and difficulty of designing PI materials. |
| Self-Study texts (reading) | Very low cost; student studies on own time at own pace. | Many people cannot learn from books; others cannot make practical applications of book knowledge. |

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From Frederick C. Dyer, "Training in Government." Reprinted, with permission, from TRAINING, The Magazine of Human Resources Development, Copyright 1974, Lakewood Publications, Minneapolis, MN 55403 (612) 333-0471.

Italics indicate changes from original.

# V. SELECTING TRAINERS/MATERIALS

## Selecting Trainers

As dissemination managers prepare to select among staff development options, they will probably follow a route used previously. This section may be used simply as a checklist of points to be considered if previous attempts to select training consultants have not produced satisfactory outcomes or if managers have not previously been faced with a choice among training options.

An early decision point will focus on the type of training preferred by the linkers and their managers. Ideally, this decision would be reached participatively, so that a carefully planned mixture of job aids, on-the-job "tutoring," observation of the work of others, workshops, college courses, self-contained training products, professional reading, etc. can be tailored to the needs/interests of each individual linking agent.

Another key decision is likely to arise when the need for an external trainer or consultant has been identified and agreed upon. Some of the issues that should then be addressed would be:

- Number of years the person has served as a trainer/consultant;
- Approximate number of dissemination personnel trained successfully to date;
- Type of training experience the training expert usually offers;
- Availability at time(s) when linkers require training;
- Geographic limitations (if any);
- Usual basis of fee (and expenses); and
- Special areas of expertise.

Other points that might be considered include:

- How solid is the trainer's knowledge of the dissemination project's operation and its organizational climate--or of similar projects--or of the constraints under which the given project operates?
- How has the trainer demonstrated that he/she is dedicated to assuring growth and improvement of linking agents? (Check references!)
- Are there any clues that the person offering to conduct training is eager to satisfy his/her ego or earn money, or is motivated by other reasons that might vitiate the training effort?

Given that the answers to these questions prove satisfactory, decisionmakers should go on to discuss with the selected candidate(s) the following two key areas:

(1) A written scope of work for the training effort, including a firm agreement on fee and expenses.

(2) A full understanding of:

- How the interests/needs of those to be trained were determined;
- What is to be learned, in terms of the present skill levels of the linking agents, so that gains can be measured afterward;
- Why the linkers are working at that level at present;
- How the learning experiences are to be carried out; and
- How effects will be evaluated (e.g., performance objectives, if any).

In moving through a delicate decisionmaking process of this type, dissemination managers should keep in mind that the "best" resource person may be someone working outside the field of educational dissemination, for such an outsider may bring a fresh viewpoint and a depth of expertise that may not be found at present within this as-yet narrow specialty domain. After all, what really counts is improved trainee on-the-job performance, not a positive evaluation of the quality of the training experience by the trainee(s).

Hence, those searching for external help and guidance of this type should maintain a task orientation, since they are not seeking someone merely to dispense information.* Rather, they hope to locate someone who can work effectively with small groups to change their behavior by designing and facilitating activities that will lead to desired work outcomes. Also, each linker should finish the learning experience with a plan of action and a feeling that collegial and managerial support will be available whenever needed.

Most commonly, when a dissemination project looks for external help, its staff will phone those it trusts at similar projects and ask for recommended names. Through such established "networks," information can be collected on some of the people a given trainer/consultant has worked with and helped; the results obtained with those client groups can usually provide clues as to a given expert's suitability to offer the planned learning experiences.

If a dissemination project employs several linking agents on its staff, it is highly likely that each has something positive to offer to the others in a jointly planned workshop experience. In a sense, each can be a consultant

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* However, a preliminary "awareness" session may be desirable so that staff about to undergo training will have a clear idea of the experiences about to unfold, the training objectives, and the anticipated follow-up opportunities.

to the others in one or more skill or knowledge areas if a sharing atmosphere prevails. Here, too, is the basis for opportunities whereby one linker can observe the work of others so as to pick up techniques, viewpoints, and bits of wisdom that will fit into his/her particular repertoire over time.

Not all skills can be acquired in one hour or one day or one week. A one-shot visit by an external expert may prove stimulating and effective for certain linkers immediately, but others, with different learning styles, may need follow-up and reinforcement before sought-after improvement is actually demonstrated in day-to-day activities. That's why some redundancy is always built into any efficient staff development program.

## Selecting Materials

When selection among training products (or experiences) is being made, the following criteria may prove useful when it comes time to review the options that may be discovered after a search through catalogs and other reference tools. For each criterion, a weighted value (e.g., 1 to 3) might be assigned. That is, a cluster may be three times more important to the linkers' manager and/or to the linkers than another would be.

### Rationale

Is the purpose defined clearly? Are there specific objectives in terms of cognitive, affective, and skill gains that may be achieved?

### Cost

Is the product reasonably priced in terms of its quality and its content? Is it reasonable in terms of the numbers of linking agents that can learn from it at one time and in succeeding uses? Are support facilities/equipment needed in order to use the product, or is it truly self-contained when purchased? Are additional human resources needed?

Accessibility

Can it be purchased (or enrolled in, if part of a course or workshop) without difficulty? Will its use require a large amount of time? Is it transportable to the local site? Must someone travel a long distance to obtain it? Can the materials (or a portion of them) be duplicated locally without much additional effort/cost? Must the learning experience be linked to some expensive hardware (such as a computer)?

Appropriateness

Does it meet linking agent priorities? Is it easy to use? Is it practical (that is, nothing unusual required of the learner)? Does it emphasize real-world practice as contrasted to theory?

Authenticity

Is it accurate? Is it up-to-date? Is it well developed (that is, research or knowledge based, with evidence of linker participation in its development)? Is it user approved (that is, field tested with linkers and critiqued by practitioners)?

Adaptability

Can it be adapted with minor modifications to the needs/interests of a specific group of linking agents (its content focus, its style/format, etc.)?

High Interest

Are its activities challenging and worth carrying out? Are they close to linking agents' real experiences? Does it provide optional learning modalities (e.g., not simply a series of end-of-activity paper-and-pencil quizzes)? Are the activities highly motivational?

Technical Quality

Are items clear (visually, aurally)? Is it well constructed? Is it free of jargon? Does it provide performance criteria? Does it offer practice in a nonthreatening learning sequence? Does it offer application of what is being learned?

Availability for Trial

Can it be seen? Can it be touched? Can it be tried out in advance?

Organization

Does it seem balanced? Is it easy to follow? Is it divisible into sections/components? Is it flexible?

Scope

Does it provide full or partial coverage of a topic/domain/skill? Is it self-contained? Is it self-instructional? Does it provide feedback (i.e., is it self-evaluative)? Is there adequate redundancy? Have potential learning difficulties been scaled down into manageable chunks?

Social Fairness

Is it non-sexist and non-racist?

No one would expect any given product to meet every one of these possible criteria. They are offered here simply as a checklist from which decision-makers may choose the items most pertinent to their own planned dissemination-oriented training efforts. Since few learning packages are specifically focused on linking agents, the checklist may be more useful as a way of demonstrating what should be added to existing materials at the time they are actually used.

Many potentially useful training materials and programs were originally developed for those in other roles, such as school administrators, consultants,

or teachers. In many cases, materials or programs must therefore be adapted to meet the needs of linking agents. As indicated earlier, assessment of training needs is a vital first step in planning for staff development--analysis of staff functions, of needs expressed or problems identified, and of new skills/knowledge likely to meet those needs or solve those problems most efficiently.

However, all too often a training experience is expected to solve problems for which training itself--or the particular training--is quite inappropriate. Therefore, sometimes it may be preferable to reorganize, to reassign staff duties, or to change procedures within the dissemination project. It is important to keep in mind that in some situations no amount or type of training will prove useful unless some other, more basic changes are made.

It seems apparent that many already available training materials and programs can be highly pertinent to linking agents' needs and interests. But experience to date strongly suggests that packaged training materials will be much more effective if a person experienced in their use can assist with the training effort or, at least, can provide an orientation for those who will actually conduct the local training.

To the degree possible, those planning training for linking agents should try to visit with others who are already using such materials so as to observe a variety of options before choosing some to experiment with in their own staff development programs. Until a linker has actually participated in the use of a product, such as a simulation game, it is extremely difficult to make an intelligent decision about its suitability for the needs/interests of a known group of linking agents.

# VI. RESOURCES

This section summarizes, quite incompletely, a handful of examples of possible staff development resources. The presence/absence of an agency/product/organization/publication in this tentative* listing should not be construed as either endorsement or disapproval. In fact, under "People" we are merely offering a model listing, with only a single name, so that users of this guide can begin to construct their own files of resource persons. No category is intended to be complete or even to have been verified; the sample entries have been inserted merely as a jumping-off point for the development of nationwide (or regional) inventories during the coming year.

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* Current as of November 30, 1977

## ORGANIZATIONS

| NAME | ADDRESS | PHONE | FOCUS |
|---|---|---|---|
| American Society for Training and Development (ASTD) | Box 5307<br>Madison, WI 53705 | (608) 274-3440 | Training of all types |
| American Association of School Administrators/ National Association of School Executives (AASA/NASE) Contract Programs | 1801 North Moore Street<br>Arlington, VA 22209 | (703) 528-7875 | Educational administration focus |
| University Council for Educational Administration (UCEA) | 25 West Woodruff Avenue<br>Columbus, OH 43210 | (614) 293-2564 | University-oriented training for school administrators |
| Ontario Council for Leadership in Educational Administration (OCLEA) | 252 Bloor Street West<br>Suite N1201<br>Toronto, Ontario M55lV5 | (416) 923-6641 | Workshops tailored to client needs (e.g., program evaluation, team building, managing interpersonal conflict) |
| Linker Training Service | Northwest Regional Educational Laboratory (NWREL)<br>710 S.W. Second Avenue<br>Portland, OR 97204 | (503) 248-6800 | Training for NIE-funded dissemination projects |
| National Staff Development Council | c/o Director of Staff Development<br>School District U-46<br>Elgin, IL 60120 | (312) 888-5315 | Staff development within local school districts |
| University Associates | 7596 Eads Avenue<br>LaJolla, CA 92037 | (714) 454-8821 | Organizational development (OD) and human relations |
| Didactic Systems, Inc. | Box 457<br>Cranford, NJ 07016 | (201) 789-2194 | Design of participative training materials |

ORGANIZATIONS (Continued)

| NAME | ADDRESS | PHONE | FOCUS |
|---|---|---|---|
| Project Leadership, Association of California School Administrators (ACSA) | Norwalk, CA | (213) 868-0846 | Workshops with administrator focus |
| National School Public Relations Association (NSPRA) | 1801 North Moore Street Arlington, VA 22209 | (703) 528-5840 | Communication techniques |
| American Management Association | 135 West 50th Street New York, NY 10020 | (212) 586-8100 | Management techniques |
| NTL Institute | 1501 Wilson Boulevard Arlington, VA 22209 | (703) 527-1500 | Human interaction, consultation skills |
| Technical Assistance Brokerage, Capla Associates, Inc. | 18 Overlook Avenue Rochelle Park, NJ 07662 | (202) 845-3399 | Limited training for National Diffusion Network contractors |
| Adult Education and Lifelong Learning Clearinghouse (ADELL) | Informatics, Inc. Rockville, MD | (301) 770-3000 | Information on adult education programs |
| The NETWORK | 200 South Main Street Andover, MA 01810 | (617) 470-1080 | Training programs for linking agents |

## PEOPLE*

| NAME | ADDRESS | PHONE | AVAILABILITY | SPECIALTY | YEARS SERVED AS TRAINER | USUAL FEE |
|---|---|---|---|---|---|---|
| Judy Brown | Far West Laboratory<br>1855 Folsom Street<br>San Francisco, CA<br>94103 | (415) 565-3205 | Negotiable--nationwide | Materials packaging skills--design, development, evaluation of materials or products<br><br>Training workshop skills--development and design of group workshop format process<br><br>Management skills--technical assistance and training related to communications and diffusion planning<br><br>Consultant/networking skills--interfacing of individuals/agencies with others | 11 years | $150.00/day plus expenses |

( S A M P L E  E N T R Y  O N L Y )

* Such issues as invasion of privacy, freedom of information, etc. preclude our attempting to compile and publish for others a listing of experienced trainers.

## TRAINING PRODUCTS

THE EDUCATIONAL INFORMATION CONSULTANT
(ERIC - mid 1978)

Far West Laboratory for Educational Research and Development
San Francisco, California

A training manual covering skills in disseminating educational information--negotiation, retrieval, transformation, communication, and evaluation.

A HANDBOOK OF STRUCTURED EXPERIENCES FOR HUMAN RELATIONS TRAINING (VOLUMES I-VI)
(1973-77)
($35.50)

University Associates
LaJolla, California

Six volumes featuring 146 structured experiences to engage participants in a variety of group activities. For use in planning, consensus, problem solving, leadership, intergroup communication, etc. Users may duplicate and/or modify forms, charts, activities, descriptions, and instruments for use in training.

INTERPERSONAL COMMUNICATIONS
(various prices)

Xicom, Inc.
Tuxedo, New York

A 20-session packaged workshop that provides information on basic concepts and opportunities to practice influence skills.

PREPARING EDUCATIONAL TRAINING CONSULTANTS: I-II-III
(various prices)

Commercial-Educational Distributing Services
Portland, Oregon

A series of three instructional systems--skills training, consulting, and organizational development--designed for educators who want to enhance group processes and organizational functioning of schools.

## KNOWLEDGE PRODUCTS

Becker, J. M., and Hahn, C. L. Wingspread Workbook for Educational Change Agents. Boulder, Colorado: Social Science Education Consortium, 1975. ($3.45)

Variables and generalizations related to educational diffusion, presented in a format designed to encourage educators to put knowledge into practice. The workbook is composed of a carefully structured series of questions to help users diagnose the potentials and problems of making specific changes in their organizations.

Craig, R. L. (ed.). Training and Development Handbook (2nd edition). New York, New York: McGraw-Hill, 1976. ($26.50)

The second edition of the ASTD nuts-and-bolts guide to human resources development, featuring articles by 59 specialists on organization development, career planning, sales training, measuring results, communications, use of external training, etc.

Havelock, R. G. Training for Change Agents. Ann Arbor, Michigan: Institute for Social Research ERIC ED 056 259

A theoretical guide to the design of training programs in education and other fields--goals, principles, alternative models, etc.

Hood, P. D., and Blackwell, L. An Assessment System for Competence-Based Education. San Francisco, California: Far West Laboratory for Educational Research and Development, 1975. ERIC ED 126 142

A description of the development and a guide to the use of the assessment resources which have been developed in connection with the Development, Dissemination, and Evaluation (DD&E) Functional Competence Training Program (a competence-based professional development program providing an array of training resources that concentrate on "entry-level" skills and knowledge required in educational development, dissemination, and evaluation).

Hood, P. D., and Blackwell, L. The Educational Information Market Study. Santa Monica, California: System Development Corporation, 1976. ERIC ED 135 411

A survey of the information requirements of all major educational audiences which considers such variables as organizational context, position, purposes for seeking information, sources used/preferred, desired products and services, etc. An educational information use model provides estimates of the patterns and strengths of the varied relationships. This is the most comprehensive survey to-date. It provides a basis for understanding how information needs can be identified and the requirements which emerging educational information systems should be capable of meeting.

Horn, R. E. (ed.). The Guide to Simulation/Games for Education and Training (3rd edition), Volumes 1 & 2 (academic and business). Cranford, New Jersey: Didactic Systems, Inc., 1977. ($27.00)

A reference work for the potential game user, rather than the theoretician, which covers such domains as communications, education, personnel development, and marketing among dozens of other topics. Many games are intended for school use and thus may be of limited value for adult staff development efforts. The list of simulation/gaming centers may be useful to those planning long-term training programs.

Leonard, E. C., Jr. Assessment of Training Needs. Bloomington, Indiana: Midwest Intergovernmental Training Committee Publications, 1974. ($10.00)

A systematic approach to training needs determination, organizational analysis, job analysis, manpower analysis, and training systems design. Includes questionnaires, needs survey, task detailing sheet, management appraisal form, etc.

Mick, Colen, et al. Development of Training Resources for Educational Extension Services Personnel (Volumes 1-3). Stanford, California: Institute for Communication Research, 1973. ERIC ED 077 534, 077 535, 077 536

The final report, a trainers' book, and a trainees' book for extension agents working in educational dissemination activities. A set of 28 modules to train project directors, resource personnel, and field personnel were developed and tested.

Nash, N., and Culbertson, J. (eds.). Linking Processes in Educational Improvement. Columbus, Ohio: University Council for Educational Administration, 1977. ($7.50)

Six papers, prepared as a collaborative effort, among NIE, the University Council for Educational Administration, and nine federally supported educational laboratories and research and development centers, highlighting areas of agreement and disagreement within the research, development, and practice communities on the functions and support needs of those persons with a central responsibility for program improvement.

National Institute of Education. Educational Dissemination and Linking Agent Sourcebook. San Francisco, California: Far West Laboratory for Educational Research and Development, 1976. ($7.50)

A first-draft (early 1976) description of over 50 products providing linking agents and change agents with training resources or job aids. These products are useful for persons providing change support to school systems and school personnel.

Piele, P. K. Review and Analysis of the Role, Activities, and Training of Educational Linking Agents. Eugene, Oregon: ERIC Clearinghouse on Educational Management, 1975. ERIC ED 128 871

A review of literature on educational innovation and models of change, implications for linking agent roles, criteria for development of a training program, examples of programs, recent research evidence, etc.

Programmed Learning and Individually Paced Instruction (5th edition). Bay City, Michigan: Hendershot Bibliography, 1976. ($30.00)

A bibliography, with ordering information, on 3500 units in 167 subject areas for schools, colleges, business, industry, and adult instruction. Classified by subjects and by publishers, the descriptions show price, length, level, and content.

Rosenau, F. S., and McIntyre, D. Packaging Your Educational Program. San Francisco, California: Far West Laboratory for Educational Research and Development, 1977. ($7.00)

A handbook for educators focusing on the processes an exemplary project should follow when its staff is preparing for statewide or nationwide diffusion. Covers planning for the package, staffing, budgeting, scheduling, production considerations, etc.--plus an extensive set of reference materials.

White-Stevens, L. Guidelines for Writing and Printing Manuals. Hightstown, New Jersey: Educational Improvement Center, 1977. ($1.35)

How to plan and organize an educational manual, tips on printing, and suggestions on securing copyright and a publisher. Includes many practical examples.

## PRODUCT AND WORKSHOP CATALOGS

| | |
|---|---|
| EDUCATIONAL DISSEMINATION AND LINKING AGENT SOURCEBOOK | Far West Laboratory for Educational Research and Development<br>1855 Folsom Street<br>San Francisco, CA 94103 |
| ASTD TRAINING RESOURCES | American Society for Training and Development (ASTD)<br>Box 5307<br>Madison, WI 53705 |
| USER GUIDE TO TRAINING RESOURCES (Educational Development, Dissemination, and Evaluation Training Resources) | National Teaching Systems<br>1137 Broadway<br>Seaside, CA 93955 |
| UNIVERSITY ASSOCIATES CATALOG/LEARNING RESOURCES CATALOG | University Associates, Inc.<br>7596 Eads Avenue<br>LaJolla, CA 92037 |
| MANAGEMENT DEVELOPMENT GUIDE (Catalog of Courses, $3.75) | American Management Association<br>135 West 50th Street<br>New York, NY 10020 |
| CATALOG OF IDEAS FOR TRAINING/COMMUNICATING | Didactic Systems, Inc.<br>Box 457<br>Cranford, NJ 07016 |
| INSTRUCTIONAL RESOURCES CATALOG | University Council for Educational Administration (UCEA)<br>25 West Woodruff Avenue<br>Columbus, OH 43210 |
| ASI CATALOG | Advanced Systems, Inc.<br>1601 Tomme Road<br>Elk Grove Village, IL 60007 |

## NEWSLETTERS

| | |
|---|---|
| ED (Educational Diffusion)<br><br>Free to dissemination audience specified by funding agency | Published bi-monthly for the U.S. Office of Education by Far West Laboratory |
| EDUCATIONAL MARKETER ($60.00) | Knowledge Industry Publications White Plains, NY |
| RESEARCH ACTION BRIEF (gratis) | ERIC Clearinghouse on Educational Management Eugene, OR |

NOTE: Other ERIC Clearinghouses also publish newsletters; some may contain information about specialized linker training options.

## FUNDING SOURCES

### ESEA Title I

Conditional upon the approval of the State Title I Coordinator, some funds may be available if inservice staff training and travel expenses are written into the State's approved Title I budget. Both outlays would appear to meet the Division of Education for the Disadvantaged, USOE, mandate for program improvement in local school districts. However, Title I funds can be used only for staff development of Title I personnel, but it would appear that use of consultants and training experiences might well fall within the range of approved budget items.

### ESEA Title IV-C

Funds for State administration of Title IV-C of the Elementary and Secondary Education Act may be used for salaries, travel, equipment, contractual services, and other functions required to effectively and efficiently carry out program purposes and projects. Specifically, this would include costs incurred, either through direct sponsorship or through contractual arrangements, for staff development for field agents, linkage agents, extension agents, or dissemination staff persons. Additionally, staff development activities may be supported with funds authorized under ESEA Title IV-C, Section 431(a)(3), Strengthening State and Local Educational Agencies.

### General

With the approval of the Federal project officer and/or contracts officer, staff development activities should be an allowable cost item for reimbursement under present dissemination-type contracts issued by the Education Division of DHEW.

# APPENDIX A

## PRIORITY TRAINING NEEDS OF LINKING AGENTS

Two experimental survey-type instruments prepared in 1977 by the Far West Laboratory, under contract to the National Institute of Education, to begin to sense nationwide training priorities as perceived by selected managers of dissemination-type activities, by selected linking agents, and by dissemination researchers.

PRIORITY TRAINING NEEDS OF LINKING AGENTS

Appendix A

A VERSION

1. Frequency of Performance - how often do you use the specific skill in your own work?
2. Criticality - how important is this skill if you are to perform your job effectively?
3. Improvement Need - how urgently do you need help or training now to improve this skill?

| PROBLEM ANALYSIS SKILLS | Frequency of Performance | | | Criticality for Effectiveness | | | My Need for Improvement | | |
|---|---|---|---|---|---|---|---|---|---|
| | HIGH | MEDIUM | LOW | HIGH | MEDIUM | LOW | HIGH | MEDIUM | LOW |
| Helping LEAs clarify problems; verifying perceived educational problems | | | | | | | | | |
| Identifying the key people who should be involved in problem definition activity at a specific site | | | | | | | | | |
| Documenting the process of needs assessment and group problem solving, including description of problems and successes | | | | | | | | | |
| Assisting in translating needs assessment information into general problem statement for communication to key school/community personnel | | | | | | | | | |
| Assisting local staff in developing or refining criteria for screening or selecting R&D outcomes | | | | | | | | | |

Note: Remaining items are shown on following pages without checklists.

## INFORMATION COLLECTING AND ORGANIZING SKILLS

Dealing with information overload, system noise

Formulating clear, concise needs/problems statements and retrieval requests; helping LEAs request information in searchable form

Retrieving documents and materials from source and delivering them

Knowing users' preferred formats for print information (avoiding technicality, "ERIC," "journalese," etc.)

Contacting experts/specialists for additional information, guidelines, and help

## ANALYZING INFORMATION SKILLS

Recognizing differences between knowledge-based and non-knowledge-based options

Analyzing existing resource materials

Bringing together people to work jointly on innovative projects (merging requests)

Examining documents for omissions

Deriving implications for practice from research-based information

## PLANNING SKILLS

Adapting diffusion strategy to particular target audiences (market segmentation, product differentiation, social marketing research, etc.)

Helping clients with adoption plans/proposals for funding

Selecting among various intervention modes

Organizing own efforts and ideas

Helping clients select appropriate solutions from available knowledge

PRODUCING SKILLS

Conducting a brainstorming session

Working across bureau/division/program lines in own organization (e.g., regional office, state education agency)

Stimulating interest in educational improvement and environment for change

Planning and managing a workshop

Gaining acceptance for linking program; gaining interest and confidence of school personnel



EVALUATING SKILLS

Locating and arranging for evaluation assistance as necessary

Interviewing (face-to-face or telephone) site participants to obtain information on their attitudes, interests, activities, reaction to, or evaluation of the project

Evaluating program impact

Collecting data on product effectiveness, user satisfaction, and adaptations

Documenting the process of installation including description of problems and successes

## DISSEMINATION & MARKETING SKILLS

Comparing/contrasting costs of alternative dissemination strategies

Training dissemination/liaison personnel in client systems

Obtaining information on local norms (commonly held beliefs, attitudes, behaviors)

Clustering clients for service

Using newsletters as a dissemination mechanism (submitting useful items breezily written, helping to distribute, obtaining feedback, etc.)

## IMPLEMENTING SKILLS

"Trouble shooting" problems that may develop at school sites during planning or implementation stages

Assisting school districts in developing plans to institutionalize the improvements being achieved through the utilization project

Helping to gain support for change

Adapting workshops to specific needs or selected practitioners (readiness, previous experience, etc.)

Working with adoption committees

## COMMUNICATING SKILLS

Dealing with communication breakdowns/unexpected obstacles

Defining and explaining role and function, how to use services

Building and maintaining communication among client systems, linker agency, and superordinate (external) dissemination sources

Conducting effective demonstrations/briefings/show-and-tell; making informal presentations to school or community personnel

Identifying and using group interaction and communication techniques to facilitate group involvement.

PROBLEM ANALYSIS SKILLS B VERSION

Determining need for and assisting in search for existing management tools that can be used to train and help local personnel to conduct in-depth analyses of their need

Assisting local staff/community in producing an analysis of site-specific problems based on empirical examination of the local situation and in establishing priorities regarding needs/problems

Identifying professionsls who can assist in the use of group problem-solving techniques

Assisting local site in selecting and building a needs assessment and planning team, teaching clients how to perform needs assessment

Conducting group problem-solving activities at district or building level

INFORMATION COLLECTING AND ORGANIZING SKILLS

Knowing where demonstrations and materials may be seen (visitor sites, actual use -- not printed descriptions)

Acquiring information regarding concepts/curricula in use

Assisting local staff in obtaining information about R&D outcomes which may be relevant to their defined need or problem

Clarifying vague requests

Helping teachers become aware of information resources (training them in use of resources)

ANALYZING INFORMATION SKILLS

Estimating realistic per-pupil costs of adopting an innovation

Helping clients clarify ESEA Title I, IV-C, and other application and regulation procedures

Helping clients use synthesized information

Reviewing materials/ideas with clients

Scanning and underlining important aspects of materials

## PLANNING SKILLS

Identifying priority needs for technical services

Furnishing/helping generate alternative solutions

Managing delivery of resources/services

Knowing when to say "no"

Setting priorities for own work/budgeting own time

## PRODUCING SKILLS

Helping change teacher attitudes

Encouraging educators with similar needs/problems to meet together and work out strategies

Arranging, organizing, and conducting workshops/meetings

Knowing how to provide (or find) technical assistance (in implementation, staff development, packaging, public information, etc.)

Developing group decision-making skills

## EVALUATING SKILLS

Assisting school districts to monitor periodically and to evaluate the ongoing work at local sites to determine that the installation plan is being followed and is effective

Recognizing virtues/limitations of current evaluation/validation procedures

Evaluating dissemination impact (cost/benefit analysis)

Assessing feasibility/effectiveness of various alternatives

Evaluating one's services, impact, activities

## DISSEMINATION & MARKETING SKILLS

Assisting local site in developing plans for disseminating information about the project and in responding to requests for information

Finding and reaching target audiences; devising publicity strategies to reach all clients

Working with existing diffusion systems

Locating and encouraging other sources of diffusion help--e.g., funding agencies, resource/service centers, networks, colleges, private consultants, trainers, evaluators, Project Information Packages, teacher and learning centers, teacher organizations, administrator organizations, professional associations, etc.

Working knowledgeably with state/local textbook/materials adoption (bidding) procedures--state and local selection, procurement, purchasing--allocations/procedures, regulations

## IMPLEMENTING SKILLS

Providing expertise needed to install selected R&D outcomes by developing additional linkage with state department consultants, R&D organizations, universities, etc., as may be appropriate

Helping plan appropriate orientation and/or training for staff, citizens, and students who will be affected by the change

Helping clients locate Federal/state/foundation/other supplementary resources to install new programs

Helping clients organize effective inservice training

Helping to build implementation plans

## COMMUNICATING SKILLS

Explaining materials and their nature to clients

Establishing friendly working relations with clients at every level

Developing two-way communication channels

Listening actively/asking nonjudgmental questions

Synthesizing/summarizing

## DEFINITION OF DISSEMINATION

The Dissemination Advisory Group (DAG)* determined that activities engaged in by those claiming to do dissemination can be classified into one of four categories according to the intent or purpose of each activity. Since the categories are related and frequently sequential, the DAG adopted a definition which has four levels and defined each level in both words and examples:

Level 1: Spread

The one-way casting out of knowledge in all its forms; information, products, ideas, and materials, "as though sowing seeds."

Examples: Radio and television broadcasts, general mailings (without follow-up or feedback), news releases, speeches, official publications (e.g., the Federal Register, Commerce Business Daily), journal and magazine articles, books, newsletters; inclusions in ERIC, libraries.

Level 2: Exchange

The two-way or multi-way flow of information, products, ideas, and materials as to needs, problems, and potential solutions.

Examples: Need arousing, need sensing, and activities which provide for user influence ("feedforward"); feedback activities, such as user surveys, user panels, and site visits; and sharing activities, such as conferences among peers.

Level 3: Choice

The facilitation of rational consideration and selection among those ideas, materials, outcomes of research and development, effective educational practices, and other knowledge that can be used for the improvement of education.

Examples: Incentives of local education agencies to engage in search behavior before making decisions; training in decisionmaking; visits by decisionmaking practitioners to a variety of demonstration sites; searches of resource bases and comparisons of the array of relevant programs, products, or knowledge so generated; catalogs comparing alternatives; traveling exhibits.

Level 4: Implementation

The facilitation of adoption, installation, and the ongoing utilization of improvements.

Examples: Consultation, on-user-site technical assistance, locally tailored training programs in required new behaviors; laboratory settings for the practice of new behaviors.

The DAG recognizes that an appropriate level of effort, or an appropriate set of dissemination activities to satisfy the dissemination authority in any particular law may involve fewer than all four levels of the definition. Through the use of the complete definition, Congressional intent as to the focus of dissemination activities can usually be readily determined.

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* DAG served in a consultant role to the Education Division of the Department of Health, Education and Welfare in 1976.